Johnson City TIP Tracker Website Deployment Instructions

Westat, Inc. | 9/30/16

These instructions are intended to help guide you in deploying the TIP Tracker website.

Site Requirements

The TIP Tracker site requires the following Microsoft Server environment:

- Windows Server 2008 or later, running Microsoft IIS 7 or later to host the site.
- Microsoft .NET Framework 4.0 to run the website
- Microsoft SQL Server 2008 or later, with SQL Server Full Text Search service enabled, to store the data and allow free text searches for TIP projects.

Prepare the Website's Database

Follow these steps to prepare the initial site database:

1. Set up Microsoft SQL Server to host the site's database. (See minimum requirements above.)
2. Create a new database for the site data (e.g., "JC_Tip_Tracker"). Note the name does not need to be specific to a certain TIP. The site supports multiple TIPs, only one of which is visible to the public at time. This TIP is referred to as the "active TIP".
3. Open the provided SQL script ("johnson_city_script.sql") in a text editor (e.g., Notepad or Notepad++).
4. Search and replace all instances (33 total) of 'DATABASENAME' with the name of the database (e.g., " JC_Tip_Tracker ").
5. Execute the contents of the script in Microsoft SQL Management Studio.
6. Verify that the database has been created. You should see approximately 55 tables under the "Tables" tree.

Prepare the Website

Follow these steps to set up the website:

1. Download the website files, JC_TIP_Tracker_Website.zip.
2. Unzip the file locally.
3. Publish the website files to the web server.
4. Identify a site email address (e.g., tiptracker@jcmtpo.com) and create a mailbox for this site.
5. Update the site's Web.config file. The Web.config file at the root of the site has a number of entries that need to be customized for your deployment.
    a. Update the connection string include the name of your server and database as well as the ID and password that will allow the site to read and write to the database.

```
<connectionStrings>
<!-- UPDATE with server name, databse name, user ID and user
Password for accessing the database -->
<add name="JohnsonCitySQLServer"
connectionString="Server=ENTER_SERVER_NAME_HERE\SQLEXPRESS2008;Da
tabase=ENTER_DATABASE_NAME_HERE; Integrated Security=false;user
Id=ENTER_USER_ID_HERE; password=ENTER_PASSWORD_HERE;"
providerName="System.Data.SqlClient" />
</connectionStrings>
```

b. Update (or verify) these keys in AppSettings.

   i. We have provided default values for all of the displayed text on the site, such as the site name. But you can change these names by editing the values in the web.config. For example, to change the name of the site, change the "SiteName" key.

```
<appSettings>
<!-- ************************************** -->
<!-- *   Keys to change on live site        -->
<!-- ************************************** -->
<add key="SiteName" value="Johnson City MTPO Interactive TIP" />
<add key="Client_Name" value="Johnson City MTPO" />
<add key="ClientMpoWebsiteURL" value="http://www.jcmpo.org/" />
<!-- NOTE: WebsiteURL must end in a forward slash -->
<add key="WebsiteUrl" value="ENTER_SITE_URL_HERE_WITH_FINAL_SLASH/>
<add key="NewUserCreatedFromEmail"
value="ENTER_SITE_MAILBOX@jcmpo.org" />
<add key="PasswordRecoveryMailFromEmail"
value="ENTER_SITE_MAILBOX@jcmpo.org" />
<add key="NewPublicCommentEmailFromAddress"
value="ENTER_SITE_MAILBOX@jcmpo.org" />

...
</appSettings>
```

c. Update the connection string to point to the SQL Server database.

```
<connectionStrings>

<!-- UPDATE with server name, databse name, user ID and user
Password for accessing the database -->
<add name="JohnsonCitySQLServer"
connectionString="Server=ENTER_SERVER_NAME_HERE\SQLEXPRESS2008;Da
tabase=ENTER_DATABASE_NAME_HERE; Integrated Security=false;user
Id=ENTER_USER_ID_HERE; password=ENTER_PASSWORD_HERE;"
providerName="System.Data.SqlClient" />

</connectionStrings>
```

d. Disabling custom errors:

i. If the site gives you problems when you first try to run it, turn custom errors off, so you can see and share with us what is going wrong. To do so, change the "customErrors" mode to "Off".

```
<!-- DURING BETA PERIOD AND TESTING, leave custom errors off (set mode="Off") so it shows more detailed information -->
<customErrors mode="Off" defaultRedirect="~/SystemError.html">
```

e. Set the SMPT settings to allow the site to send email:

```
<!-- SMTP Configuration -->
<mailSettings>
   <smtp deliveryMethod="Network"
from="ENTER_SITE_EMAIL_HERE@jcmpo.org">
   <!-- Update below for your email system -->
   <network host="relay.westat.com" port="25" userName=""
password="" defaultCredentials="true" />
    </smtp>
</mailSettings>
```

Once the web.config is configured correctly, the site should display properly.

Getting Started on the Site

1. **To initially log into the site, use the default Administrator account:**

   Account ID: *administrator*
   Password: *password*

   a. NOTE: You should change this password as soon as you take the site live. Per step 3, you should create personal "Administrator" accounts for each person who will administer the site.

2. **Create a new TIP**
   a. On the site, as in your work, the TIP is the container for a set of TIP Projects. The site is delivered with a "test" TIP. We recommend that you create a new, blank TIP. To do so:
   b. Log in as an Admin.
   c. Go to the Database tab.
   d. Scroll to the bottom, "List of Transportation Improvement Programs (TIPS)". FYI, there is a quick link, "TIPS", at the very top of the page that will jump you down to this section.
   e. Click "Create a New Transportation Improvement Plan".
   f. Supply the requested information.
   g. To then make this the "active TIP" that shows projects on the map on the home page, click "Configure Site" at top-right.
   h. Click "Set Active TIP" on the left-side navigation.

i. Choose the newly-created TIP from the list.
j. Now the home page will be default show this new TIP. As you create new project, they will be part of this TIP.

3. **Create administrator and staff accounts.**
   a. It's easy for one Administrator to create accounts for other Admins as well as for MPO Staff and Partner agencies.
   b. Click Configure Site in top right.
   c. Viewing the list of users, click "Add a New User".
   d. Follow the prompts and the account will be created. NOTE: When a new account is created, the person will be emailed a link to the website with their account ID and an auto-generated password which the user can change.

4. **Encourage partners to create accounts.**
   a. You as an Admin can create accounts for your partner colleagues using the same process as described above.
   b. Partners can also take the initiative to create their own accounts. By default, these accounts are "Public" accounts, which limits what they can see and do. But the person can click the link on the My Account page to request that their account be upgraded to a partner account. The person is prompted to select what agency they are with, along with a warning conveying that this request is for official partners only. This will send an automated email to all Admins letting them know of the request. You can then review/vet the request, and click Edit to change the role to Partner or Staff.
   c. Note: A user is never automatically made a partner (unless you create the account as described in step 3). An Admin has to "upgrade" all public accounts manually; this gives you control who can access the site with this enhanced status.

5. **Review and update the site lists**
   a. The website has various lists of aspects of a TIP Project -- e.g., the Lead Agency, the Improvement Type, Funding Sources, etc.
   b. The site will begin with all of the list choices from Nashville, but is easy for you to modify and add to these lists from the website.
   c. To modify the site lists, click Configure Site and then click "Configure Lists". Choose a list, such as "Funding Sources". You can then add, delete and edit entries.
   d. Please view and update all of the lists except for the following: Mime Type, Public Comment Status, and TIP Project Status.
   e. NOTE: Funding Sources and Improvement Types are *grouped* into Funding Source Groups and Improvement Type Groups. This is controlled by the "FundingSourceGroupID" and "ImprovementTypeGroupID" value that is set for each individual item. We would recommend to review the groups first and once you have them established, you can assign each item to a group. (Glenn Frankel can give you a quick web tutorial on how to do this if you would like.)

6. **Begin creating projects inside the TIP**
    a. Projects can be created in two ways by Admins and Staff. Both methods are initiated on the Database tab.
        i. Click Create New Project to create a new project that will immediately be "live" and visible to the public.
        ii. Click "Create new proposed amendment" will create a project that starts as a "draft" and is only visible to Admin, Staff and Partners. To allow the public to review the project, change the status to "Approved for public review and comment."
    b. Glenn Frankel of Westat can do a virtual meeting to walk you through how projects and proposed amendments work.

7. **Review and Update the Site Terms document.**
    a. On all pages, at the top-right, is a link, "Help with terms used on the site". This opens a PDF file that can contain whatever information you would like to help the public (and partners) with terms and concepts employed on the website.
    b. This document needs to be updated.
    c. To update the document, go to the website's "files" folder. There you will find a Word document, "TIP Terms.docx". Update this document, save it as a PDF, and that PDF will automatically be opened by users when they click this link.

8. **Upload map GIS data**
    a. Unzip the Shapefile Publish tool, file "TIP_Tracker_Shapefile_Uploader.ZIP" to your local file system.
    b. Note: Even though the program has "Nashville" in the name, it will work with any TIP Tracker website. Where the shapefiles are uploaded is controlled by the config file, as described below.
    c. Open the file " NashvilleShapefileUploadTool.exe.config" in a text editor like Notepad or Notepad++. Here you will tell the tool about your website. Change the value for the TargetUrl setting in this file.

```
<setting name="TargetUrl" serializeAs="String">
<value>http://PUT_SITE_URL_HERE/UploadProjectGeometry.aspx</value
> -->
</setting>
```

    d. For example, for Nashville's TIP Tracker site, their setting is:

```
<value>http://maps.nashville.gov/MPO_TIPApp_1720/UploadProjectGeo
metry.aspx</value>
```

    e. Run the program in this folder (no "install" operation is necessary): NashvilleShapefileUploadTool.exe.

f. Follow the prompts to upload a shapefile for a given TIP Project.

Let us know if you have any questions or experience problems setting up the website. Once it's online, Glenn Frankel of Westat would be happy to briefly walk you through the site and explain how to get started.